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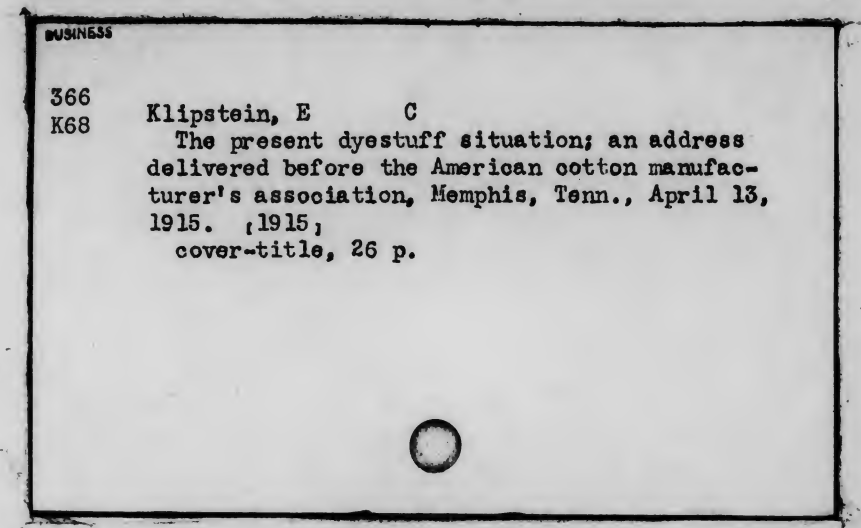
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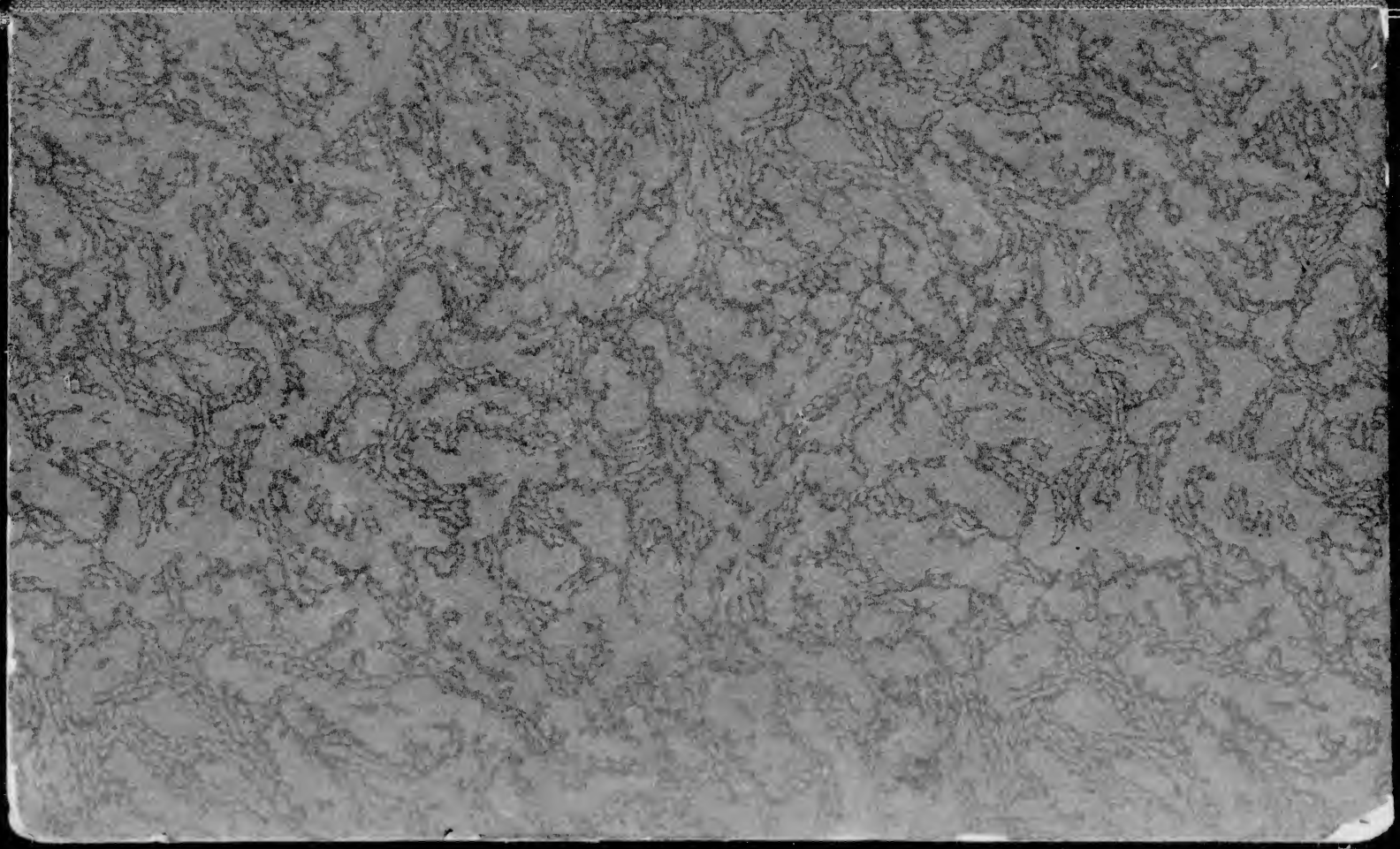

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The Present Dyestuff Situation

AN ADDRESS

DELIVERED BEFORE

The American Cotton Manufacturers' Association

Memphis, Tenn.
April 13, 1915

BY

E. C. KLIPSTEIN

Business
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JUN 7 1946 PCR

THE PRESENT DYESTUFF SITUATION.

The use of dyestuffs has its foundation in the human eye. We find pleasure in looking at beautiful colors and on this fact is based the art of dyeing. Coloring a textile fabric injures its durability and does not improve its warmth or comfortable properties. If the whole dyestuff industry were swept out of existence, mankind would suffer nothing. For this reason, it is a matter of wonder that the inventions and discoveries that have led to the development of the Coal Tar Dye Industry during the past fifty years, are hailed as such great and important human achievements.

Somewhat earlier in time, a simple American invented the cotton gin, another the sewing machine, and a third discovered anæsthesia. Any one of these achievements is of incomparably more importance than the invention of synthetic dyes. To obliterate the knowledge of anæsthesia would be a world calamity. To blot out the cotton gin and the sewing machine, would plunge every nation into industrial chaos, and cause inexpressible suffering. Much the same may be said of the commercial importance of the Coal Tar Dye industry. To judge from the terrible headlines in the newspapers and the dramatic outcry of some people, one might think that the stoppage of dyestuff importations from Germany is as great a calamity as the failure of a cotton crop.

As a matter of fact, the entire importations of all Coal Tar products, by the United States, including dead oils, only amounts to $14,959,000 yearly, or a trifle more than the banana imports of $14,000,000, and only one-third the nut imports of $42,000,000. Nevertheless, for us, who are directly concerned with the use of dyestuffs, it is a matter of great importance to obtain an adequate supply.

At the outbreak of the present war there was a two-months' supply in the United States. From the first of August to the end of December the importations of dyes were practically normal, so that, on January 1st, there was still a supply of dyes in the country for two months. Since January 1st the importations have been decreasing and the reserve supply, therefore, has been gradually disappearing. From the present time forward the importations will practically cease, so that it is now a question of weeks until the reserve supply become exhausted and the textile industries be brought face to face with a real famine in Coal Tar Dyes.

I attach a statistical table (Appendix 1), showing the imports of the three chief classes of Coal Tar Dyes (Alizarine, colors and dyes, and Indigo), from which it appears that the average monthly quantity of Alizarines and Indigo for the years 1913-14, was 1,101,631 pounds, while for the last five months of 1914, from August to December inclusive, it was 1,166,944 pounds, so that we actually imported in the last five months of 1914 an average monthly supply, which exceeds the two years' monthly average by 65,313 pounds or 5.9%. On the other hand, the average monthly value of the three classes of dyes above mentioned was, for the two years 1913-1914, $791,374, while for the last five months of 1914, August to December, it was only $772,605, a decrease of $18,769

or 2.42%. This difference in value was due to the decline in the prices of dyes during 1913 and 1914.

Such being the case, the panic which seized the dyestuff consumers in August, and has gradually augmented in force since, would seem to have been unjustified. It was, however, very logical, being based on actual conditions:

FIRST—The chief raw materials for the dye industry are also the chief raw materials for explosives, and nations are willing to pay more for killing men than for dyeing their clothing.

SECOND—The sudden advance in the cost of living, the increased cost of freight and insurance, the lack of labor caused by the mobilization of armies, brought about a sharp advance, at the source of supply, of all dyestuffs, and, therefore, necessitated a material advance in prices to consumers everywhere. The situation in Germany is expressed by the following circular recently issued by the whole body of German Coal Tar Dye makers:

Owing to

THE INCREASED COST OF

RAW MATERIALS

Also the

REDUCTION OF OUR WORKING FORCE BY ONE-HALF ON ACCOUNT OF SERVICE IN THE ARMY,

THE REDUCTION OF OUR OUTPUT FOR LACK OF FOREIGN SALES,

WHICH MEANS THE DOUBLING OF OUR OVERHEAD CHARGES, WE ARE COMPELLED TO MATERIALLY

ADVANCE OUR PRICES.

THE ADVANCE IN RAW MATERIALS INCLUDES
COAL TAR PRODUCTS,
SULPHURIC, NITRIC AND HYDROCHLORIC ACIDS.

THE COST OF PRODUCTION IS FURTHER INCREASED BY THE STRENUOUS MEASURES TAKEN BY THE GERMAN GOVERNMENT TO INSURE SUPPLIES FOR THE ARMY.

(Signed by)—

Actien-Gesellschaft fuer Anilin-Fabrikation, Berlin.
Badische Anilin & Soda-Fabrik, Ludwigshafen am Rhein.
Leopold Cassella & Co., G.m.b.H., Frankfurt am Main.
Chemikalienwerk Griesheim, G.m.b.H., Griesheim am Main.

Chemische Fabrik Griesheim-Elektron, Frankfurt am Main.
Chemische Fabriken vorm. Weiler-ter Meer, Uerdingen am Rhein.
Farbenfabriken vorm. Friedr. Bayer & Co., Leverkusen bei Coeln a/Rh.
Farbwerke vorm. Meister Lucius & Bruening, Hoechst am Main.
Farbwerk Muehlheim vorm. A. Leonhardt & Co., Muehlheim am Main.
Anilinfarbenfabrik Carl Jaeger, G.m.b.H., Duesseldorf-Derendorf.
Kalle & Co., Aktien-Gesellschaft, Biebrich am Rhein.
Wuelfing, Dahl & Co., A.-G., Barmen.

The German Government has put very severe restrictions on the exportation of dyes. Dealers are prohibited from exporting at all, while manufacturers are only allowed to ship to former customers and in quantities not greater than formerly used.

England promptly placed an embargo on the exportation of Coal Tar products, in order to conserve the supply for her own factories. As she had depended on Germany for about ninety per cent. of her consumption of dyes, the absolute cutting off of the German supply at once precipitated a real dyestuff crisis. She possesses, however, several large plants, which produce the raw materials, such as Aniline Oil, Nitro-benzol, the Diamines, etc. She has one Alizarine plant, one Indigo plant and two large plants capable of producing a large variety of finished dyes. All these plants are being worked to their fullest capacity and also being enlarged. Nevertheless, the seriousness of the situation in England may be judged from the fact that ordinary Natural Indigo is to-day selling at $3.00 per pound. In order to hasten relief, the British Government is considering ways and means to assist the manu-

facturers to increase their production of dyes to such proportions as to make England independent of the world.

Very much the same state of affairs exists in France, Russia and Japan, which are all large consumers of dyestuffs.

A recent issue of "Commerce Reports" has the following to say about Italy:—

> "It is rather surprising to learn that there is a shortage of dyestuffs in Italy, for one would have thought supplies could have been obtained from both Switzerland and Germany. It is possible, however, that Italian dyers are not prepared to pay the extremely high prices, which prevail in England at present, so that the Swiss colors are virtually all finding their way to the English market, while transport difficulties may be preventing the delivery of German dyestuffs. The position is evidently serious, for at a meeting on the subject, just held in Milan, it was stated that many dyers had been forced to close their works entirely on account of lack of dyestuffs, while most of the others were on short time. It was proposed to attempt to establish the manufacture of dyestuffs in Italy. Special reference was made to the English scheme, and it was considered that one on the same lines would be suitable for Italian conditions."

It may be mentioned that Italy, like England, has no duty on dyes, but unlike England, she does not produce the raw materials. In this respect Switzerland resembles Italy, and yet, next to Germany, Switzerland is the largest producer of Coal Tar Dyes, including Indigo. Under ordinary circumstances, the Swiss could have produced all classes of dyes in sufficient quantity to have materially mitigated the severity of the impending famine—but just here is shown the importance of producing the raw materials in the country making the finished dyes. Switzerland has no coal and, therefore, no Coal Tar. For her raw materials she is dependent on Germany and England.

When she began the manufacture of Indigo, she insured her supply of raw material, Aniline Oil, by purchasing The Clayton Aniline Company of Manchester, England, whose chief manufacture is Aniline Oil. The raw materials for a large proportion of the other dyes produced, were purchased from Germany. At the outbreak of hostilities, the German Government prohibited the export of raw materials to the Swiss dye works, except under a guarantee that none of the finished dyes should be shipped to any country at war with Germany. This guarantee the Swiss refused to give, and, therefore, had to discontinue the manufacture of a great number of dyes. The British Government cut off the supply of Aniline Oil by placing an embargo on its exportation, thus forcing an entire suspension of the Swiss dye works. Subsequently, however, an arrangement was reached by the Swiss with the English Government, permitting the exportation of Aniline Oil and other raw materials to Switzerland, thus enabling the Swiss to resume the manufacture of Indigo and such other dyes as can be produced from such raw materials as England can supply—and that is what the Swiss are doing to-day.

In the United States there are four factories capable of producing a limited number of dyes, but they must depend for a part of their raw material on Germany, and are, therefore, very much restricted in their production. Owing to the enormous demand for Toluol, Benzol, Picric Acid, etc., caused by their use, at high prices, for explosives, the coke producers of the United States are largely increasing their capacity to recover the by-products of the coke ovens, from which all these raw materials are obtained.

The necessary installations are being pushed as rapidly as possible, so that in time, our dye manufacturers will

be able to obtain, or produce, the chief raw materials needed. But the erection of the necessary plants is always slow, and at best, we must wait many months for any relief by the American dye works. Altogether, we are now approaching the supreme test of our resourcefulness.

During the past eight months we have been asked a thousand times why the United States, England and France, each possessing an abundant supply of raw materials, do not make their own Coal Tar Dyes. As England is a free trade country, and France and the United States are high protectionists, the result cannot be charged to the tariffs of these countries. England, to-day, without any tariff, is really in a better position than either the United States or France with highly protective tariffs.

Evidently, there is something else back of this remarkable phenomenon, and that something is to be found in the patent laws of all three countries. Commencing with the patent on Alizarine and ending with the patents on Synthetic Indigo, all three countries have furnished Germany with the means of monopolizing the Coal Tar Dye business. On the money made out of patents obtained in these three countries, Germany has accumulated the capital, which enabled her to build the immense plants, which are the wonder of the world, and the controllers of the dyestuff business to-day.

An Englishman, Perkins, discovered Aniline Dyes; an English firm, Brooke, Simpson & Spiller, together with a French firm, A. Poirrier & Co. of Paris, first became prominent as manufacturers of Aniline Dyes nearly fifty years ago, and yet, to-day, Germany controls the Coal Tar Dye industry. In order to change this condition, all three countries must change their patent laws.

As concerns the United States, however, we must still place much of the blame for this anomalous condition on

our tariffs. Since 1862, this country has been avowedly controlled by the protectionist principle of building up American industries by means of the tariff. During the past forty years, we have raised our tariffs almost to the point of prohibition in order to establish home industries, and yet the Coal Tar Dye schedule has been so manipulated as to destroy the Synthetic Dye industry instead of building it up.

I am afraid that this lamentable result must be attributed largely to the textile manufacturers of the United States themselves, because in their desire for free raw materials, they have aided the European dye-maker and patent owner in killing off the struggling Coal Tar Dye industry in the United States. This is a point which I do not propose to argue, but simply content myself with appending an abstract of the United States tariffs on cotton and dyestuffs since the foundation of the Government (Appendix 2). From this it may be seen, that while the duty on the manufactures of cotton has steadily gone up, the duty on dyes has steadily gone down, until nearly 50% of the Coal Tar Dyes are in the free list.

This policy was all right when Indigo and Cutch, and Cochineal and Logwood and Fustic came from tropical countries and could not possibly be produced in the United States. Although it helped the foreign producer by broadening his market, it did no harm to any American manufacturer. But the situation changed entirely on the advent of synthetic dyes, which can be produced here as well as in Europe. To put Synthetic Indigo and Alizarine in the free list is exactly equivalent to giving the foreign dye maker protection to the amount of the duty remitted.

Just how the present situation has been brought about, may be seen by referring to the public hearings before the Congressional Committees, which are public property.

On Tuesday, March 19th, 1912, the Senate Finance Committee was giving hearings on the proposed Underwood Tariff Bill, putting a duty of 10% on Indigo and Alizarine Dyes. A representative of one of the German dye-makers expressed himself as follows:—

> "As an importer of Aniline Colors, I am in favor of a reduction (of duty), for the benefit of American (cotton?) manufacturers, especially Indigo. Ninety-eight per cent. of the Indigo used is Synthetic, which is controlled absolutely by patents and cannot be produced in the United States on account of patents."

Another German manufacturer of Indigo wrote the following brief to the same committee:—

> "The purpose of this letter is to briefly call your attention to two paragraphs on the free list: Section 487, alizarine, natural or artificial, and dyes derived from alizarine or from anthrocene; Section 592, indigo (meaning vegetable and synthetic).
>
> "We sell these products to the cotton, woolen, paper, leather and paint industries in the United States; we make long-period contracts and import against these contracts; the attached pro forma contract shows the obligation incurred by the buyer in making these contracts.
>
> "All these fast dyes have been on the free list under the tariff laws of 1883, 1890, 1894, 1897 and 1909. They are not manufactured in the United States and never have been, and there is no question of protection involved. They were originally put upon the free list for a definite and specific purpose, and they have been kept there for 30 years for like reasons.
>
> "The object of putting indigo, alizarine, and anthracene dyes on the free list was to enable the textile industry of the United States to produce coarse goods which were, so far as durability of color was concerned, equal not only to textile

fabrics made in other countries, but the highest grade of textiles made here.

"The object of the manufacturers of these fast dyes was, from the very beginning, to place them within reach, as to cost, of the manufacturers of coarse cotton goods, for in no other way could a large consumption be secured."

In support of the above pleas, a southern Indigo consumer testified that the cost of the Indigo used in making his denims was 7½% of the cost of his fabric. It pained him to think of the hardship that would be caused the poor American laborer on account of the additional cost, caused by the proposed 10% duty on Indigo.

His statement was confirmed by the president of the American Cotton Manufacturers' Association, and further supported by a brief presented by Mr. Green of Providence, R. I., in which occurs the following prayer:—

"We petition that for these reasons, Indigo as well as Alizarine and Anthracene Dyes be left on the free list."

This prayer, for the foreign patent owner and dye-maker, was signed by 38 of the most prominent cotton manufacturers in this country. In consequence of these prayers, the proposed 10% duty on Indigo and dyes obtained from Indigo and Anthracene, was withdrawn, while dyes obtained from Carbazol were for the first time placed in the free list.

That is the way the American dye consumer has been pulling the chestnuts out of the fire for the foreigner, during the past forty years. The Coal Tar Dye industry is adapted to this country because of our abundant supply of raw materials, and with fair tariff treatment, would have flourished and extended. It has not had fair treatment.

I am not a believer in bolstering up an illogical industry with tariff duties, but I am still less a believer in imposing duties for the express benefit of other countries. When you put a duty on a raw material that *must* be imported and then put the finished product in the free list, you are protecting the foreigner and actually discriminating against the home manufacturer. That is just what Congress has been doing since 1883. The American dye manufacturer must needs make the prayer of the backwoodsman: "Oh Lord, if you won't help me, don't help the bear." For the past forty years Congress has been helping the bear. Let us hope that in future the American dye consumer will be willing to "live and let live", and exert his influence more generously in favor of the American dye maker.

There is no excellence without great labor and sacrifice. You gentlemen, if need be, must be willing to sacrifice a few years of cheap dyes in order to enable your fellow-American dye manufacturers to make us independent of the world as to Coal Tar Dyes.

Just here I will venture to sound a note of optimism.

Fifty years ago last Saturday, the South laid down her arms after a devastating war, that had left her helpless, disheartened and impoverished. Although practically ignorant of manufacturing, the Southern soldier laid aside his uniform and started in to build cotton mills. Today the eleven Southern States operate nearly two and a half times as many spindles as the entire country possessed in 1865, and with these spindles, work up three and one-third times as many pounds of cotton as were consumed by all the mills in the United States when Lee surrendered.

That is a splendid achievement, accomplished by pluck and energy, without the possibility of any tariff protection against the old established mills of the Eastern

States. Something of the same spirit, the same persistent hard work applied to the manufacture of dyestuffs, will unquestionably make the United States independent of the world for her supply of Coal Tar Dyes.*

There has never been a more favorable time for laying the foundation of a Coal Tar Dye industry in this country than the present. The patents owned by foreigners on the dyes themselves and their raw materials, have run out, leaving the industry free. The machinery needed is also patent free now, and much cheaper than forty years ago. We produce in abundance the raw materials, and what is more, we produce also the men to handle them.

During the past forty years, the universities of the United States have raised their standard of scholarship to the European level, so that to-day we have thousands of young men, coming out of our universities and technical schools, who are fully able to compete with Europeans, whether from Germany or France or England. Let us trust in the young men. Even under our old crude backwoods education, we have contributed something to the world's progress—anæsthesia for instance, and the cotton gin, the sewing machine, the telegraph, the telephone, the phonograph, the typewriter, the electric light, the aeroplane, the submarine, and what, for some people, is of more importance than all the rest put together, the rubber-cored golf-ball. There is a possibility then, that if we seriously take up the dyestuff problem, we may at least hold our own with Europe. Let us hope—and be Americans.

---

*

1860.

Spindles in entire U. S.: 5,235,727.

Pounds of cotton used in entire U. S.: 422,704,975 lbs.

1915.

Spindles in 11 Southern States: 12,702,226.

Pounds of cotton used in 11 Southern States: 1,402,871,350 lbs.

Appendix 1.

IMPORTATIONS OF COAL TAR DYES FOR 5 MONTHS, FROM AUGUST TO DECEMBER, 1914, COMPARED WITH IMPORTATIONS FOR 2 YEARS, 1913-1914.

IMPORTATIONS AUG./DEC. 1914.

August.			
Alizarine	430,569 lbs.	value	$113,470
Dyes		"	321,947
Indigo	887,265 "	"	101,344
	1,317,834 lbs.		$536,761
September.			
Alizarine	85,722 lbs.	"	$18,550
Dyes		"	232,612
Indigo	276,132 "	"	55,598
	361,854 lbs.	"	$306,760
October.			
Alizarine	226,014 lbs.	"	$81,573
Dyes		"	571,876
Indigo	270,240 "	"	124,976
	496,254 lbs.	"	$778,425
November.			
Alizarine	1,678,282 lbs.	"	$414,642
Dyes		"	1,081,281
Indigo	1,830,241 "	"	252,167
	3,508,523 lbs.	"	$1,748,090
December.			
Alizarine	3,162 lbs.	"	$788
Dyes		"	447,311
Indigo	147,097 "	"	44,892
	150,259 lbs.	"	$492,991
Total 5 months:			
August	1,317,834 lbs.	"	$536,761
September	361,854 "	"	306,760
October	496,254 "	"	778,425
November	3,508,523 "	"	1,748,090
December	150,259 "	"	492,991
	5,834,724 lbs.	"	$3,863,027
Average monthly	1,166,944 lbs.	"	$772,605

IMPORTATIONS FOR 2 YEARS
ENDING DECEMBER 31, 1913-1914.

1913.			
Alizarine	5,918,337 lbs.	value	$1,493,446
Dyes		"	7,111,483
Indigo	8,345,125 "	"	1,137,569
	14,263,462 lbs.	"	$9,742,498
1914.			
Alizarine	4,248,535 lbs.	"	$1,216,536
Dyes		"	6,845,160
Indigo	7,927,151 "	"	1,188,795
	12,175,686 lbs.	"	$9,250,491
Total for 2 years:			
Alizarine and Indigo	26,439,148 lbs.	"	$5,036,346
Dyes		"	13,956,643
	26,439,148 lbs.	"	$18,992,989
Average monthly for 2 years:			
Alizarine and Indigo	1,101,631 lbs.	"	$209,847
Dyes		"	581,527
	1,101,631 lbs.	"	$791,374
Average monthly quantity Alizarine and Indigo:			
For 5 months, 1914	1,166,944 lbs.		
For 2 years, 1913-14	1,101,631 "		
Increase in 5-month period	65,313 lbs. or 5.9%		
Average monthly value total products:			
For 2 years, 1913-14			$791,374
For 5 months, 1914			772,605
Decrease in value for 5-month period			$18,769 or 2.42%

The decrease in value is due to the steady decline in prices during 1913 and 1914.

Appendix 2.

DYESTUFFS AND COTTON IN THE TARIFFS OF THE UNITED STATES.

TARIFF JULY 4TH, 1789.

DYESTUFFS.	COTTON.
Dyeing drugs and woods, free.	Cotton, 3c. lb.
Indigo, 16c. lb.	Ready-made clothing, 7½%.

TARIFF AUGUST 10TH, 1790.

Indigo, 25c. lb.	Cotton, 3c. lb.
Dyeing woods and drugs, free.	Cotton manufactures, 7½%.

TARIFF MARCH 2ND, 1791.

7½% duty extended to all colored manufactures of cotton.

TARIFF JUNE 7TH, 1794.

Cotton goods, 5%.

TARIFF MARCH 3RD, 1797.

On dyed and printed muslins, etc., an additional 2½%, making total duty 7½%.

TARIFF APRIL 27TH, 1816.

Indigo, 15c. lb.	Manufactures of cotton, 25 to 33⅓%.
Dyeing drugs, 7½%.	

TARIFF MAY 22ND, 1824.

Manufactures of cotton, 25%.

TARIFF MAY 9TH, 1828.

Indigo, additional 5c. lb. for one year, then increased to 10c. lb.	Cotton manufactures increased specifically.

TARIFF JULY 14TH, 1832.

(A lowering tariff.)

Indigo, 15%.
Dyeing drugs, free.
Cotton manufactures, 20 to 25%.

TARIFF MARCH 2ND, 1833.

Indigo, free.
Also all dyes, except alum and bichromate of potash, free.
Cotton, as in the previous tariff, unchanged, 20 to 25%.

This was the *first* tariff, making INDIGO FREE of duty, while leaving the manufactures of cotton at 20 to 25% duty.

TARIFF JULY 30TH, 1846.

THE WALKER TARIFF.

The most rational tariff ever made, and which, therefore, remained unchanged for 15 years.

Indigo, 30%.
Dyewoods, 5%.
Articles for dyeing, 20%.
Manufactures of cotton, 25 and 30%.

TARIFF JULY 14TH, 1862.

Extract of resin or Aniline Colors, 25%.
(This is the *first mention* of *Aniline Dyes in the tariff.*)
Extract of Indigo, 10%.
Extracts Indigo and Dyewood extracts, 10%.
Cotton, 1½c. lb.
Cotton goods, 5% to 1c. per sq. yard.

TARIFF JUNE 30TH, 1864.

Aniline Dyes, $1.00 per pound and 35% ad valorem.
Indigo carmined, 20%.
Cotton, 2c. lb.
Cotton goods—White, 5c. per sq. yard.
Bleached, 5½c. per sq. yd.
Colored, 5½c. " " "
plus 10%.
Denims, 35%.
Cotton shirts, velvets, braids, etc., 35%.

TARIFF JULY 14TH, 1870.

Aniline Oil, free.
Aniline Dyes, 50c. 16 and 35%.
Manufactures of cotton, 2 to 3c. lb.

TARIFF MARCH 3RD, 1883.

Alizarine, free.
Aniline Dyes, 35%.
Coal Tar products, not dyes, 20%.
Indigo and artificial Indigo, free.
Aniline Oil, free.
Aniline Salts, free.
Cotton thread, from 10c. to 48c. per lb.
Cotton cloth, not exceeding 100 threads to the square inch, plain, 2½c. per sq. yard.
If dyed, 4½c. per sq. yard.
Other products, up to 40% ad valorem.
Cotton cloth, plain, exceeding 200 threads to the sq. inch, 4c. per sq. yd.
If bleached, 5c. per sq. yd.
If dyed, 6c. " " "
Hosiery, common, 35%.
Fashioned, 40%.

This was the tariff that killed the Coal Tar Dye industry in the United States. It will be observed that, although Aniline Dyes had the specific duty of 50 cents per pound removed, Aniline Oil, Alizarine and Indigo were put on the free list. Cotton cloth was taxed 4 cents per square yard, if undyed, and 6 cents per square yard or 50% more, if dyed.

TARIFF OCTOBER 1ST, 1890.

MCKINLEY TARIFF.

Coal Tar Dyes practically unchanged, except Alizarine Dyes made free.
Cotton cloth, exceeding 200 threads per sq. inch, plain, 4½c. per sq. yd.
If dyed, 6¾c. per square yard.

TARIFF AUGUST 27TH, 1894.

WILSON BILL—DEMOCRATIC.

Coal Tar Dyes reduced to 25%.
Alizarine Dyes and Indigo, free.
Aniline Oil, free.
Aniline Salt, free.
Cotton yarn, white, 3c. per lb. and upwards.
If dyed, 6c. per lb. to 8c. per lb.
Cotton cloth, exceeding 200 threads to the square inch, white, 3c. per sq. yard to 4½c. per sq. yard, according to weight.
If dyed, 5¾c. per sq. yd. to 6¾c. per sq. yd., according to weight, or when valued over 16c. per sq. yd., 35%.

TARIFF JULY 24TH, 1897.

DINGLEY BILL.

Coal Tar Dyes, 30%.
Coal Tar preparations, 20%.
Alizarine Dyes and Indigo, free.
Aniline Oil, free.
Aniline Salt, free.

Cotton yarn, white, 3c. lb. and upwards.
Cotton yarn, dyed, 6c. lb. and upwards.
Cotton cloth, exceeding 200 threads to sq. in., white, 3½c. per sq. yd. to 5c., according to weight.
If dyed, 6¼c. per sq. yd. to 7c. per sq. yd., according to weight.

TARIFF AUGUST 5TH, 1909.

PAYNE-ALDRICH BILL.

Coal Tar Dyes, 30%.
Coal Tar preparations, 20%.
Alizarine Dyes and Indigo, free.
Aniline Oil, free.
Aniline Salt, free.

Cotton yarn, white, 2½c. lb. and upwards.
Cotton yarn, dyed, 6c. lb. and upwards.
Cotton cloth, exceeding 200 threads to square inch, white, 3½c. to 10c. per square yard, according to value.
If dyed, 6¼c. to 12½c. per square yard, according to value.

TARIFF OCTOBER 3RD, 1913.

UNDERWOOD-SIMMONS BILL.

Coal Tar Colors or Dyes, 30%.
Coal Tar preparations, 15%.
Coal Tar products, as aniline oil and salts, toluidine, xylidin, etc., 10%.
Coal Tar distillates, benzol, naphthol, etc., 5%.
Alizarine and Alizarine Dyes, free.
Indigo and Indigo Dyes, free.
Carbazol Dyes, free.

Cotton thread, white, 5% to 25%, according to numbers.
If dyed, 7½% to 27½% ad valorem.
Cotton cloth, white, 7½% to 27½%.
If dyed, 10% to 30% ad valorem.

This tariff is the most favorable to the general development of the Coal Tar Dye industry ever passed. It leaves the color manufacturer a margin of 15 to 25%, and at the same time, gives an encouragement of 5% to the tar

distiller, and of 10% to the manufacturer of the primary raw materials, such as aniline oil, toluidine, etc.

It may be observed that the free list is still further enlarged by the addition of dyes obtained from Indigo and from carbazol.

The salient facts of the above record are the steady decline in the duty on dyes and the steady advance in that on cotton manufactures.

Indigo was first made free in the tariff of 1833, and permanently free in 1883, together with Alizarine.

The first mention of Aniline was in the tariff of 1862, which imposed a duty of 25% on "Extract of resin or aniline colors."

The crippling blow to the Coal Tar Dye industry here was struck by the tariff of 1883, of which all subsequent tariffs are simply modifications.

Appendix 3.

THE SITUATION IN ENGLAND AND FRANCE.

The Situation in England.

The British Government and the British dye consumers, have been considering various schemes for establishing the Coal Tar Dye industry in England since last August.

The net result is the proposal to form a company with a capital of $10,000,000, of which $5,000,000 shall be taken by the public or dye consumers at once. Against this the Government will lend the company for 25 years at 4%, payable out of the net profits, $5,000,000. Then, if the stock of the company be increased, the Government will advance up to $2,500,000 more against an increase of the subscribed capital, amounting to $10,000,000.

In addition, the Government will give the company $50,000 yearly for 10 years to support experimental laboratories, shareholders in the company to have preference in the supply of dyes made by the company.

A discussion of this scheme took place in the House of Commons, February 22nd last. Mr. H. A. Paget said that most traders believed that the only solution of the problem was for the Government to put a duty on dyestuffs after the war.

Mr. T. C. Taylor thought the best way to relieve the situation was to furnish Switzerland with the raw materials and let her make the dyestuffs for England.

Mr. Runciman, president of the Board of Trade, said that England uses yearly $8,000,000 to $10,000,000 worth of dyes, of which 80% to 90% were imported from Germany. He thought the company should be organized as proposed, with a view to establishing the industry permanently, by assuring it of the support of British dye users, and by training chemists to carry it on in the future. For the present, he thought the best way was

to secure as much as possible from Switzerland by furnishing raw materials to the Swiss manufacturers.

"COMMERCE REPORTS"—APRIL 23RD, 1915.

ENGLISH GOVERNMENT CONTROLS NATURAL INDIGO.

The British Government Board of Trade has announced that in order to mitigate the shortage of Indigo caused by the war and also to prevent any speculative holding of natural Indigo, the Government has acquired the greater part of the crop now coming forward.

This announcement will not be without interest to dyers in the United States, who have undoubtedly been figuring on a certain portion of the Indian crop of natural Indigo. In ordinary times, of course, natural Indigo is not much used in this country, as it has suffered greatly in recent years from the competition of synthetic Indigo. Now that the supply of the latter has been rendered so uncertain, however, attention has been directed once more to the Indian supply.

Separate official statistics are not to be had for American imports of natural Indigo, but the total for artificial and synthetic in 1913 was 8,345,125 pounds, as compared with 8,032,305 pounds in 1912. According to official Indian and British figures, the total exports of natural Indigo from India and England to the United States in 1913 were 200,704 pounds, and in 1912, 245,840 pounds, and these quantities undoubtedly formed the bulk of the natural Indigo imports for those years. About two-thirds of the natural Indigo imported comes directly from India. India's entire output for the 1913-14 season was only 845,376 pounds.

Two of India's most important customers are not in the market now for its product—Turkey and Austria-Hungary. The exports to Turkey in the fiscal year ended March 31, 1914, amounted to 305,872 pounds and to Austria-Hungary 174,048 pounds.

THE SITUATION IN FRANCE.

Leon Lefevre, editor of the French trade paper, "Revue Générale des Matieres Colorants", has this to say about the situation in France:—

> "The European war has demonstrated the dependence of the world on Germany for dyes. As to making these dyes in France, we must admit that we could not manufacture all the dyes used over night. An industry of this nature could not be organized even in many months. In fact, we could not undertake the task at all without absolutely prohibiting the importation of German dyes, because the Germans possess a real monopoly powerfully organized. They have a capital of $100,000,000, with their plants already paid for and written off their books. They have forty years of technical experience, an army of trained chemists and unlimited scientific laboratories. Lastly, they have a remarkable commercial organization, which carries their products to every part of the world. It is against such an enormous and powerful machine we must fight, and we cannot succeed without prohibition of German imports absolutely."

THE SITUATION IN CHINA.

China is a very large consumer of Indigo, indeed, she uses seven times as much as the United States, her imports of dyes in 1913 being:

Synthetic Indigo	$7,172,206
Vegetable Indigo	41,535
Aniline Dyes	3,943,329
TOTAL	$11,157,070

which is 22% more than our own importations of Coal Tar Dyes, including Indigo.

Consul General George E. Anderson, Hongkong, under date of March 1st, reports that the present high price

of Synthetic Indigo has caused the Chinese to resume the production of Natural Indigo, which had been a large and staple industry in China for many centuries. It is impossible to estimate the increase in the production of the dye, but it will materially affect the Indigo market of the world, if the present high prices continue.

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